BPAC AGENDA ITEM 8

MEMBER AND BENEFIT SERVICES BRANCH EFFECTIVENESS MEASURES 3rd Quarter

ATTACHMENT D
## Management Reports

MANAGEMENT REPORTS

BENEFIT SERVICES DIVISION
MONTHLY WORKLOAD ACTIVITY REPORT
MONTH OF MARCH - FISCAL YEAR 05/06

DESCRIPTION OF ACTIVITY	Monthly Activity for Month of MARCH			FY Year- to-Date Activity				Annual Activity	
	05/06 Actual	04/05 Actual	%	05/06 Actual	04/05 Actual	%	05/06 Projected	05/06 Projected	04/05 Actual
I. REPORT OF APPLICATIONS RECEIVED									
A. Service Retirements	1,964	2,035	-3.5%	17,470	17,180	1.7%	20,250	27,000	24,363
B. Disability Retirements	277	329	-15.8%	2,339	3,245	-27.9%	3,750	5,000	4,190
C. Pre-Retirement Death Benefits	158	124	27.4%	1,383	1,150	20.3%	1,275	1,700	1,570
II. MONTHLY BENEFIT PAYMENTS ADDED TO ALLOWANCE ROLLS									
A. Service Retirements	1,169	1,043	12.1%	20,224	21,862	-7.5%	18,750	25,000	26,321
B. Disability Retirements	68	21	223.8%	291	574	-49.3%	863	1,150	632
C. Industrial Disab. Retirements	82	60	36.7%	489	662	-26.1%	825	1,100	795
D. Special Death Benefits	4	7	-42.9%	30	36	-16.7%	38	50	44
E. 1957 Survivor Benefits	27	18	50.0%	155	149	4.0%	150	200	193
F. 1959 Survivor Benefits	25	16	56.3%	161	122	32.0%	180	240	161
III. PRE-RETIREMENT MEMBER LUMP SUM DEATH BENEFITS PAID									
A. Basic Death Benefits	205	200	2.5%	1,380	1,751	-21.2%	1,575	2,100	2,199
B. Group Term Life Insurance	49	37	32.4%	338	369	-8.4%	450	600	466
IV. REFUND PAYMENTS	2,753	1,915	43.8%	20,429	19,845	2.9%	23,850	31,800	25,705

# BENEFIT SERVICES DIVISION (BNSD)

REPORT OF APPLICATIONS RECEIVED

MONTH	F/Y 04/05 SR	F/Y 05/06 SR	F/Y 04/05 DR	F/Y 05/06 DR	YTD 04/05 SR	YTD 05/06 SR	YTD 04/05 DR	YTD 05/06 DR
July	2,069	1,885	420	294	2,069	1,885	420	294
August	1,860	1,882	405	309	3,929	3,767	825	603
September	1,854	1,893	384	274	5,783	5,660	1,209	877
October	2,853	3,014	355	293	8,636	8,674	1,564	1,170
November	2,208	2,409	367	265	10,844	11,083	1,931	1,435
December	1,697	1,601	407	249	12,541	12,684	2,338	1,684
January	1,351	1,305	301	189	13,892	13,989	2,639	1,873
February	1,253	1,517	277	222	15,145	15,506	2,916	2,095
March	2,035	1,964	329	277	17,180	17,470	3,245	2,372
April	2,568		338		19,748		3,583	
May	2,466		319		22,214		3,902	
June	2,149		288		24,363		4,190	
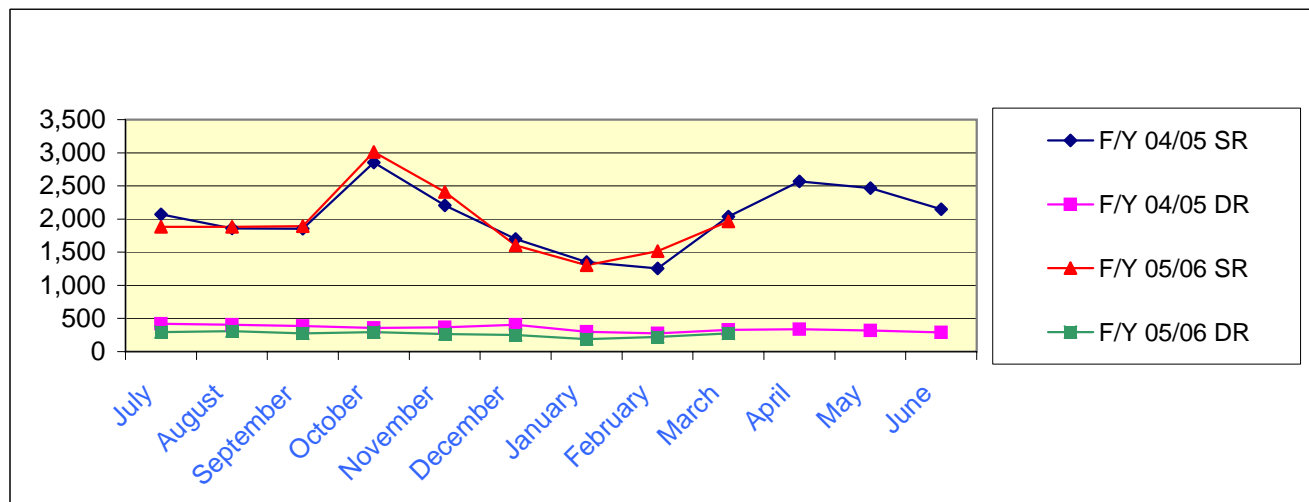
**BENEFIT SERVICES DIVISION (BNSD)**

MONTHLY BENEFIT PAYMENTS ADDED TO ALLOWANCE ROLLS

ROLL MONTH	F/Y 04/05 SR	F/Y 05/06 SR	F/Y 04/05 DR	F/Y 05/06 DR	YTD 04/05 SR	YTD 05/06 SR	YTD 04/05 DR	YTD 05/06 DR
July	4,053	3,657	143	58	4,053	3,657	143	58
August	3,810	2,361	203	89	7,863	6,018	346	147
September	2,076	2,003	149	88	9,939	8,021	495	235
October	1,745	1,784	191	80	11,684	9,805	686	315
November	1,545	1,595	107	86	13,229	11,400	793	401
December	1,341	1,338	134	48	14,570	12,738	927	449
January	4,979	4,951	124	72	19,549	17,689	1,051	521
February	1,270	1,366	104	109	20,819	19,055	1,155	630
March	1,043	1,169	81	150	21,862	20,224	1,236	780
April	1,286		56		23,148		1,292	
May	1,544		51		24,692		1,343	
June	1,629		84		26,321		1,427	
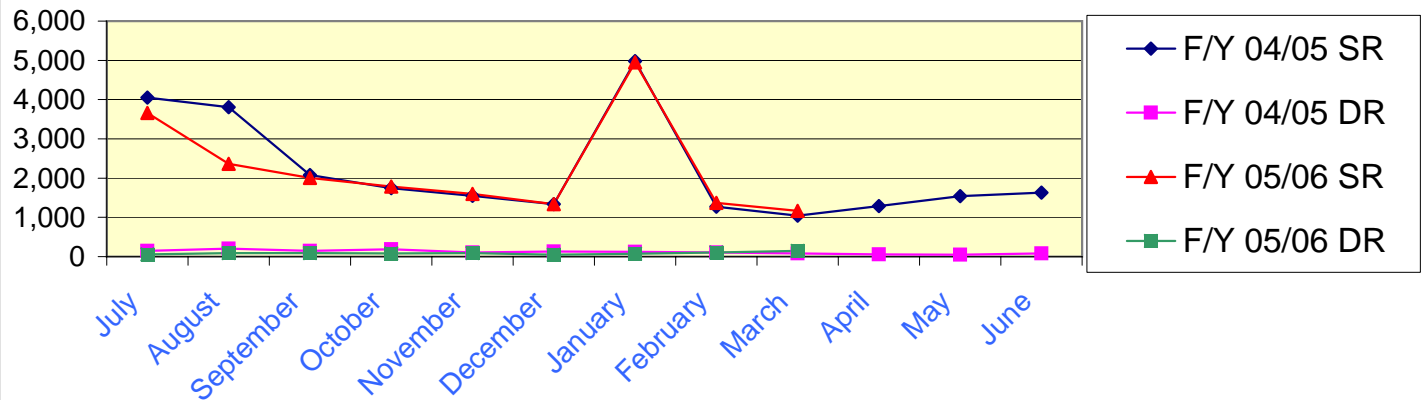
MEMBER SERVICES DIVISION (MBSD)

Quarterly Statistics for Costing Requests

Service Credit Costing Requests
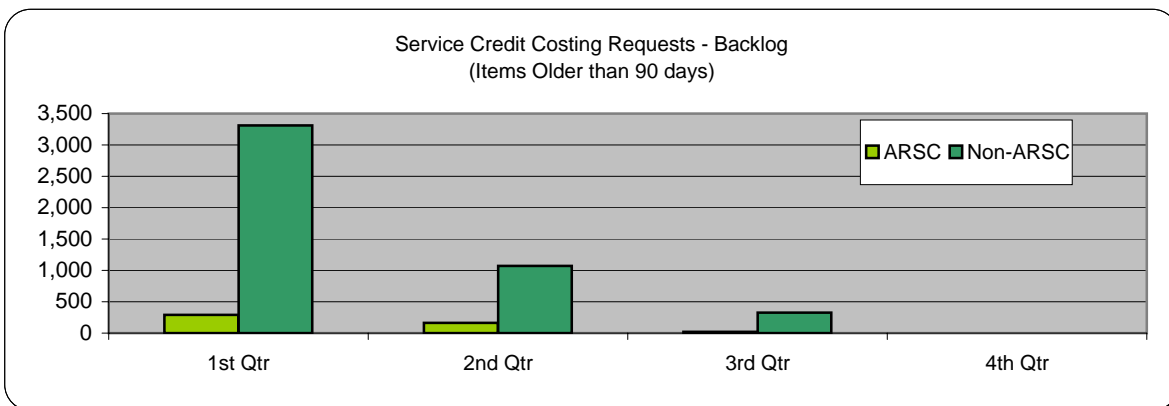### Receipts and Production
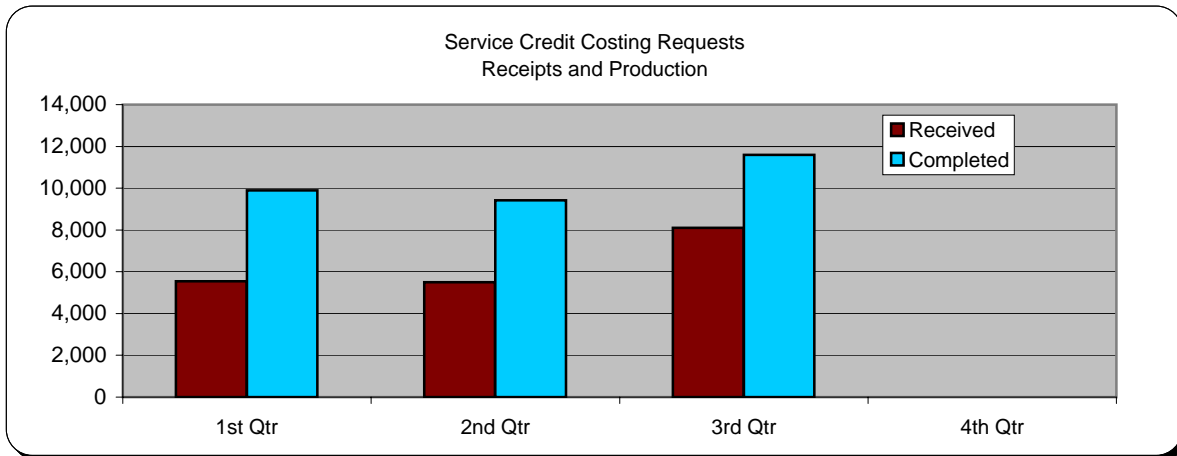
The chart above shows quarterly totals for the number of service credit costing requests received and the number completed. Over each of the last 3 quarters, the number of service credit ARSC and Non-ARSC costing requests completed have exceeded the numb

Service Credit Costing Requests
Inventory Aging
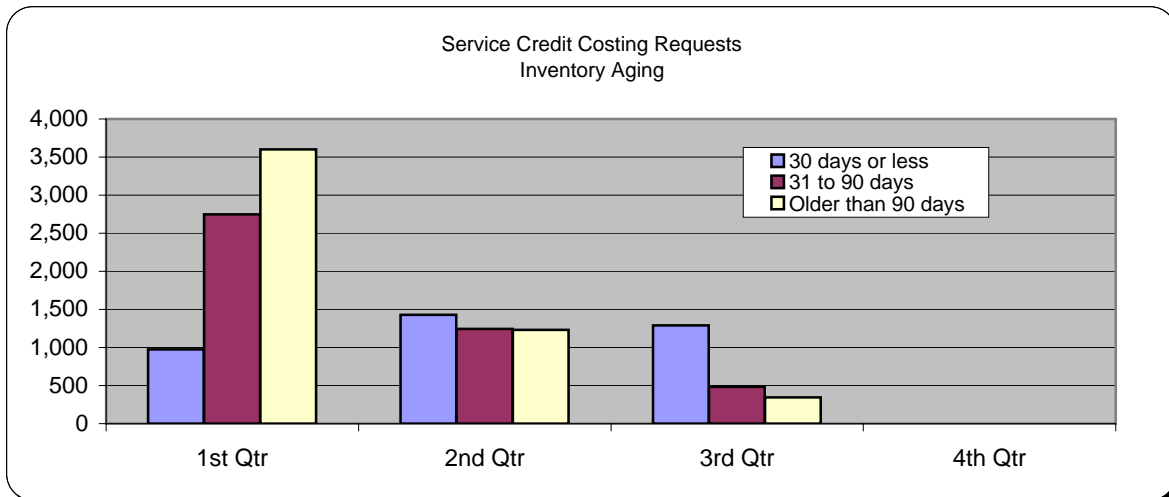
The chart above shows the inventory of service credit costing requests as of the end of each quarter, grouped into three age categories: (1) 30 days or less; (2) 31 to 90 days; and (3) Older than 90 days. The inventory for the category "30 days or less r

Service Credit Costing Requests - Backlog
(Items Older than 90 days)

Note: The data in this report does not include Confirmations nor adjustments in the 1st or 2nd quarters.

MEMBER SERVICES DIVISION (MBSD)
Quarterly Statistics for Costing Requests

Service Credit Costing Requests (Receipts & Production)				
Workload	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
Received	5,552	5,493	8,110	0
Completed	9,895	9,426	11,602	0

Service Credit Costing Requests (Inventory Aging)				
Inventory	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
30 days or less	976	1,430	1,289	0
31 to 90 days	2,749	1,244	484	0
Older than 90 days	3,602	1,233	346	0

Service Credit Costing Requests - Backlog (Older than 90 days)				
Inventory	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
ARSC	289	164	20	0
Non-ARSC	3,313	1,069	326	0

Service Credit Costing Requests (Completed By Age)				
Workload	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
Total Processed In 30 days or less	701	1,564	5,943	0
Total Processed In 31 to 90 days	2,721	3,860	3,719	0
Total Processed Older than 90 days	6,473	4,002	1,940	0
Total Completed	9,895	9,426	11,602	0

Service Credit Costing Requests (Completion Measures)				
Workload	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
Percent Processed Within 30 Days	7%	17%	51%	0%
Percent Processed Within 90 Days	35%	58%	83%	0%

**Note:** The data in this report does not include Confirmations nor adjustments in the 1st or 2nd quarters.
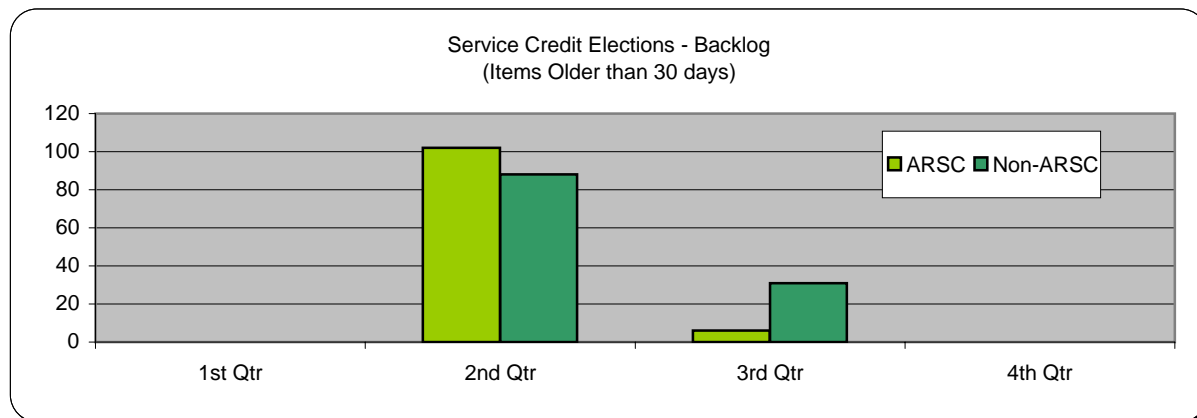
MEMBER SERVICES DIVISION (MBSD)
Quarterly Statistics for Election Requests

Service Credit Elections
Receipts and Production
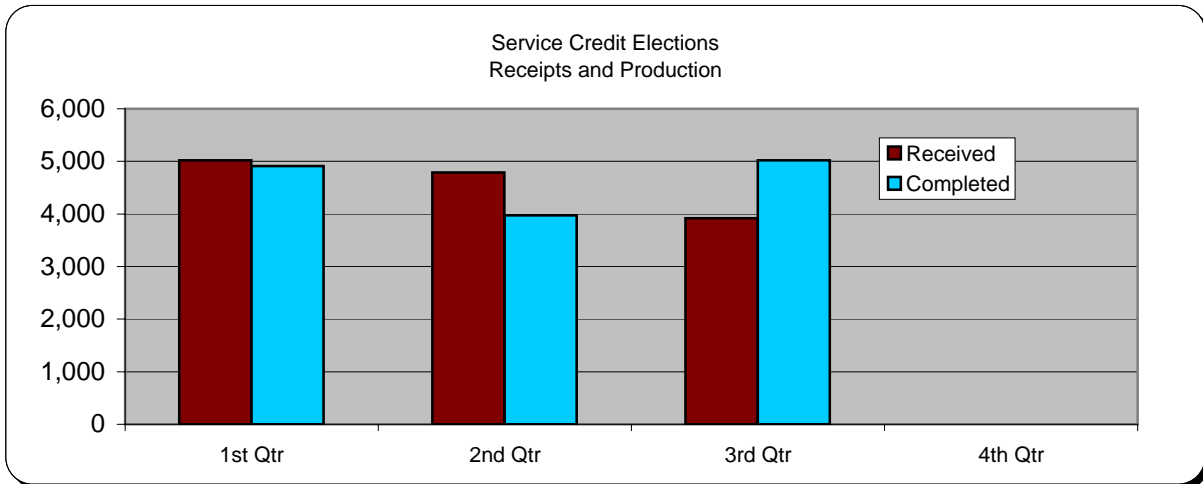
The chart above shows quarterly totals for the numbers of service credit election requests received and the number completed.

Service Credit Elections
Inventory Aging
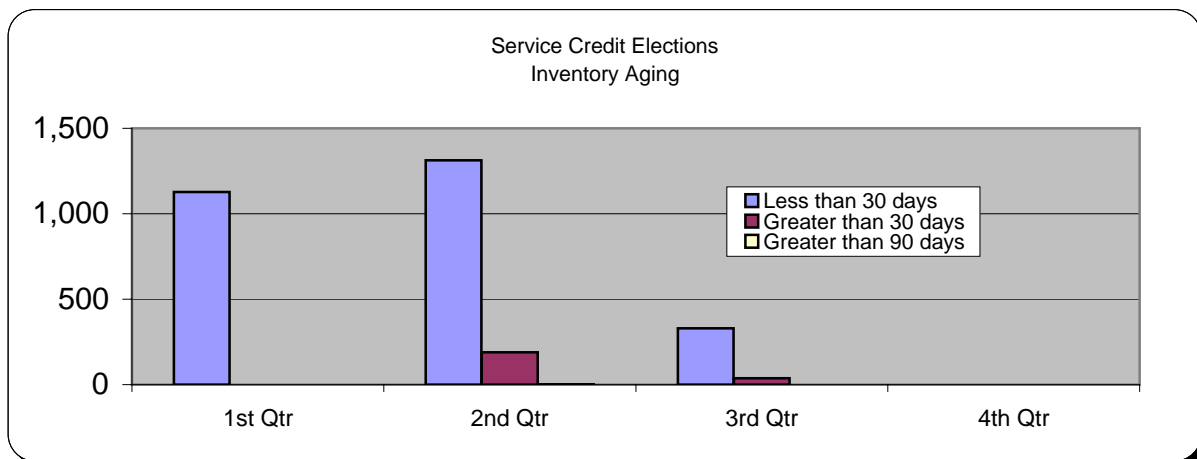
The chart above shows the inventory of service credit election requests as of the end of the 2nd and 3rd quarters, grouped into two age categories: (1) 30 days or less (1 mth); (2) those older than 30 days. No aging data for the election requests invento

Service Credit Elections - Backlog
(Items Older than 30 days)

MEMBER SERVICES DIVISION (MBSD)
Quarterly Statistics for Election Requests

Service Credit Elections (Receipts & Production)				
Workload	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
Received	5,018	4,792	3,919	0
Completed	4,910	3,975	5,019	0

Service Credit Elections (Inventory Aging)				
Inventory	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
Less than 30 days	1,127	1,313	330	0
Greater than 30 days	0	189	37	0
Greater than 90 days	0	1	0	0

Service Credit Elections - Backlog (Older than 30 days)				
Inventory	**1st Qtr**	**2nd Qtr**	**3rd Qtr**	**4th Qtr**
ARSC	0	102	6	0
Non-ARSC	0	88	31	0
Total Non-ARSC	0	190	37	0

MEMBER SERVICES DIVISION (MBSD)
Quarterly Statistics for Community Property

Community Property - Court Orders; Summons/Joinders
Receipts and Production

Legend: Received, Completed
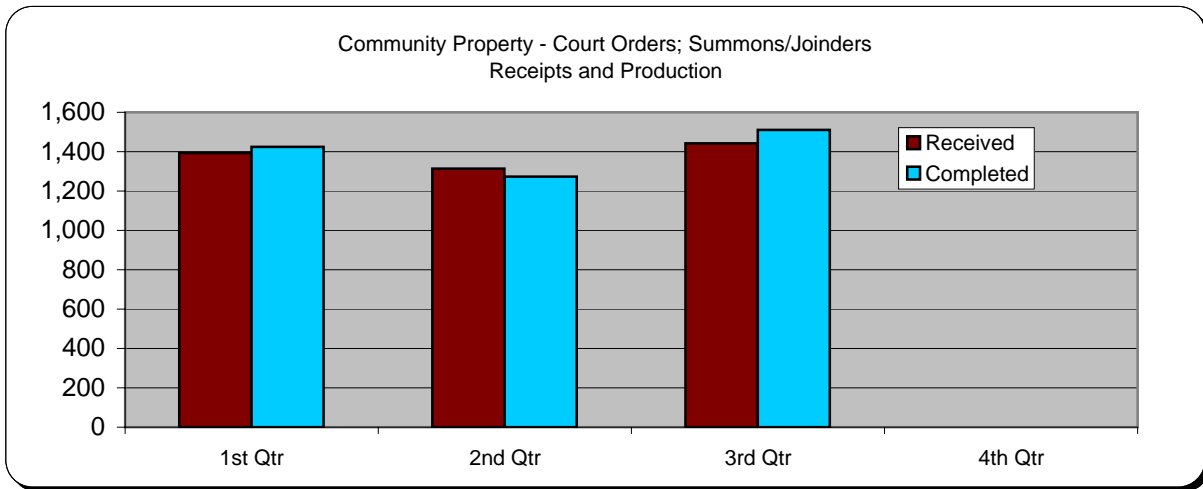
The chart above shows quarterly totals for the numbers of community property court orders and summons/joinders received and the number completed.

Community Property - Court Orders & Summons/Joinders
Inventory Aging

Legend: Less than 30 days, Greater than 30 days
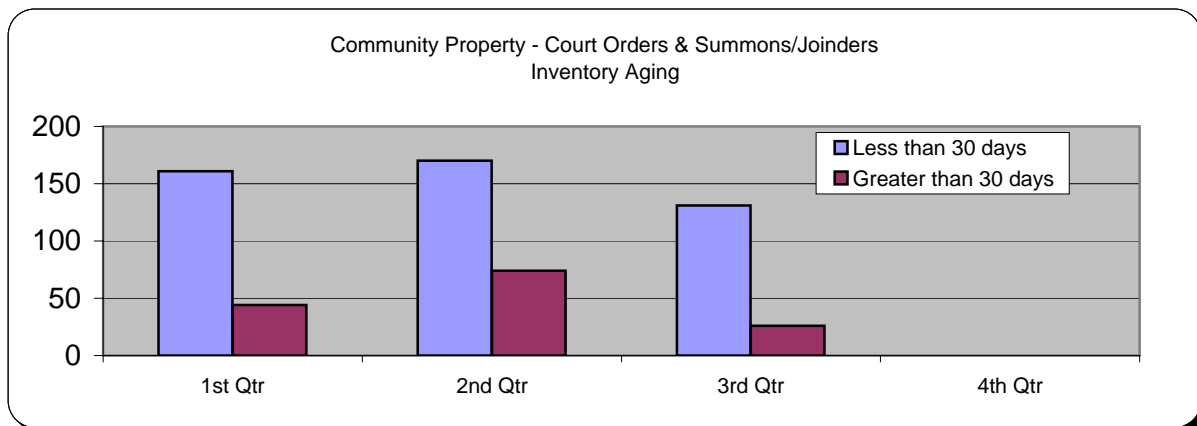
The chart above shows the inventory of community property court orders and summons/joinders as of the end of each quarter, grouped into two age categories: (1) 30 days or less (1 mth); (2) those older than 30 days.
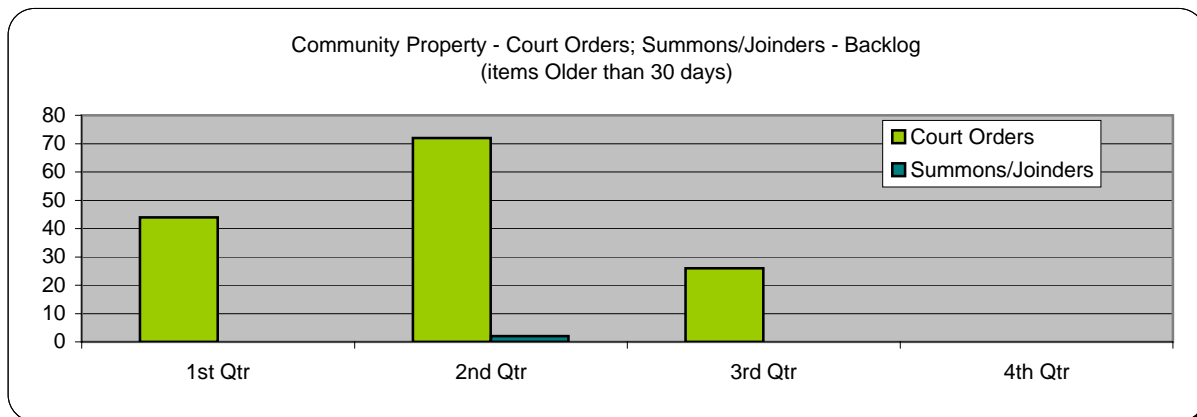
Community Property - Court Orders; Summons/Joinders - Backlog
(items Older than 30 days)

Legend: Court Orders, Summons/Joinders

MEMBER SERVICES DIVISION (MBSD)
Quarterly Statistics for Community Property

Community Property - Court Orders; Summons/Joinders (Receipts & Production)				
Workload	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Received	1,394	1,314	1,443	0
Completed	1,424	1,273	1,511	0

Community Property - Court Orders; Summons/Joinders (Inventory Aging)				
Inventory	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Less than 30 days	161	170	131	0
Greater than 30 days	44	74	26	0

Community Property - Court Orders; Summons/Joinders - Backlog (Older than 30 days)				
Inventory	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Court Orders	44	72	26	0
Summons/Joinders	0	2	0	0

MANAGEMENT REPORTS

CUSTOMER SERVICE AND EDUCATION DIVISION (CSED)

Customer Satisfaction Survey Results

January 2006 Report

Surveys Mailed To Date=   *50,361*
Surveys Returned To Date =   *9,808*
Customer Response Rate =   *5%*

Service Areas Measured	1/1/06 to 1/31/06	1/25/05 to 1/31/06 *(Full Report)*
I. Overall Service Rating – 4.5 Goal		
1) Overall satisfaction of services provided by the CCCC	**3.9**	**4.0**
II. IVR Service Rating – 4.5 Goal		
1) Ease of Use	3.2	3.3
2) Availability of Information	3.2	3.3
3) Available features	3.2	3.2
Overall =	**3.2**	**3.3**
III. Agent Service Rating – 4.8 Goal		
1) Knowledge of CalPERS benefits and programs	4.2	4.3
2) Understanding of the reason you called	4.3	4.3
3) Timely and efficient processing of your transaction	4.1	4.1
4) Politeness and professionalism	4.5	4.5
Overall =	**4.3**	**4.3**